DOCUMENT RESUME

ED 302 267 IR 052 604

AUTHOR Condron, Lyn
TITLE Linking Project Procedure Manual for Using Dumb-Barcode Linking on GEAC.
INSTITUTION Texas Woman's Univ., Denton. Library.
PUB DATE Sep 88
NOTE 19p.
PUB TYPE Guides - Non-Classroom Use (055)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Academic Libraries; *Cataloging; *Computers; Guidelines; Higher Education; *Information Systems; *Library Circulation; Library Science; *Library Services; Methods; *Online Systems; Worksheets
IDENTIFIERS *Barcoding; Library of Congress Classification

ABSTRACT

This procedure manual is designed to assist cataloging staff members at a university library through the 10-step process of barcoding and linking books classified by the Library of Congress system to the library's GEAC online computer system. A brief introduction provides background information on the project. The procedures involved in each linking session are then detailed with a number of examples. Attachments to the manual include an outline of GEAC commands; a statistics form which is used by staff members to indicate the total number of books barcoded during one linking session; a master log; and a barcode log. (CGD)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED302267

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION
CENTER (ERIC)

☒ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

LINKING PROJECT PROCEDURE MANUAL

For using dumb-barcode linking on Geac

by

Lyn Condron, Catalog Librarian

Texas Woman's University
Blagg-Huey Library
Denton, Texas

September 1988

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Lyn Condron

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

IR053604

INTRODUCTION

Soon after we began installation of the Geac online system, I was given the honor of establishing and overseeing the linking project. I consulted the literature and several libraries already using Geac. At the time, however, there was little information on Geac users linking with dumb barcodes. Therefore, I adapted the information I could find and set out almost from scratch in setting up our project.

After establishing procedures for getting books to and from the linking room, making "flags" for various types of "problem" books, signs for trucks, etc., I began training the staff in groups of six (two per terminal). The training sessions took about two hours (going through the manual; each participant doing some hands-on at each juncture where a different type of book was introduced--e.g., multi-volume, multi-copy, etc.). I then held follow-up sessions within the same week for two hours per person (as the linking room had three terminals, I could monitor three individuals simultaneously). The follow-up sessions proved to be invaluable as the environment was the same as it would be when actually linking (except, of course, that the trainer was present at the follow-up session).

Eventually, the entire library staff and most student assistants were trained. I encountered very little resistance from even the most die-hard anti-computerists. I believe most people discovered that generally their linking fears were unfounded. Though many linkers could link as many as 50-60 books per hour, the average remained around 30 per hour throughout the project. I stressed accuracy in finding the correct record on Geac rather than speed. We did not work in "teams" as many libraries do and we did not undertake a massive "week-long" project. I felt this was not as conducive to dumb-barcode linking as to smart-barcode linking.

We spent about a year and one-half on the project and have now completed linking our Library of Congress collection. As time went on, fewer staff members were scheduled to link with any regularity; eventually just the cataloging staff were linking. The project did prove to be a success.

LINKING PROJECT

PROCEDURES MANUAL

This manual will take you through the steps of the barcoding and linking process of our Library of Congress books. In brief, the steps you will be following for each linking session are as follows:

I. Fill out beginning parts of statistics form
II. Log on to Geac system
III. Call up record on screen by searching call number of book
IV. Compare book with record on screen (display)
V. Barcode book
VI. Wand barcode (link book) (change)
VII. Complete ("cmp") record (complete)
VIII. Go on to next book
IX. Log off Geac system
X. Finish filling out statistics form

1. The Linking Project will take place primarily in Room 209. In here, you should find:
   A. 3 Geac terminals with wands attached
   B. 3 trucks of books with LC (Library of Congress) call numbers
   C. Truck labeled "Problem Truck"
   D. Supply table with following items: sheets of barcodes, pens, pencils, paperclips, rubberbands, black marking pens, pre-labeled flags for problem books (these are kept on terminal table), slips of blank paper, statistic forms, "ZQHUGO Error Report" forms, wooden blocks, signs saying "THIS SIDE DONE," and copies of this manual (at each terminal). Please keep the room copies in Room 209 at all times.
2. Take any supplies needed, including a statistics form. (You should just need a sheet of barcodes, a statistics form and one pen or pencil.)
3. Look at a sheet of barcodes. A barcode is a set of bars and digits that enables us to "link" a book to our Geac computer system. It works much the same way that the "UPC" ("universal product code") works on a grocery item. When a checker runs the UPC across the magic window, the item name and price appear on the register. When we run the magic wand across a book barcode, the "record" (much like the cards in the card catalog) will be "linked" to that book so that later, when Circulation runs the wand across the barcode, the record for that book will appear on the screen. Notice that they go in sequential order down a whole column before beginning the next column. You should use them in this order. Each barcode begins with a "3"--this means the

barcode is for a book; the next 4 digits, "9351," mean "TWU;" the next 8 digits are your actual barcode number; the very last digit is a check digit for the computer and should not be recorded on your statistics. Also leave off the "3 9351" and leading zeros on your statistics.

4. Record beginning information on your statistics form (name, date, time, barcode number and call number [from book truck]). If you complete a sheet of barcodes before you finish linking, please record all ending information and begin a new statistics form for the next barcode sheet. This is a bit of extra trouble, but we must keep barcode statistics in order. It is not necessary to fill out a new sheet if you change book trucks in the middle of a barcode sheet; so your statistics form may begin with a call number in one letter, and end with a call number in another letter.

5. In this manual, "barcode" means physically placing a barcode in a book; "link" means calling up the record and wanding the barcode number into the 966 tag of Geac so that the book you have in your hand is connected to a specific record in Geac. You should not type quotation marks (" ") as shown in this manual; they are there simply to show what you should type. Words inside arrows (< >) show what will be on the screen.

6. Get comfortable with your Geac terminal and work area. Adjust the brightness with the knob on the right side under the screen by turning it to your left. Set truck with LC books to one side of terminal. Have FUN with the linking project. The cataloging department will be taking care of the problem books. If you do make a mistake, it's not the end of the world; it can be fixed! It would be much better to set a book on the Problem Truck if you're unsure of it than to go ahead and link it. We know there are many, many obscure factors involved in cataloging records and you are by no means expected to be able to puzzle them all out! Please feel free to call Lyn (x3768) or any of the other cataloging staff (same extension). Most of all, enjoy!

7. Start with books on the left side, moving from left to right. Move the wooden block so that books to the left of the block have been barcoded; books to the right have not been. When you complete a whole side of a truck (top and bottom, middle, and bottom shelves of one side), hang a "THIS SIDE DONE" sign (bend a paperclip to use as a hook) inside a book jacket on the appropriate side. A completed truck should have a "THIS SIDE DONE" sign on both sides.

8. Look at your terminal and keyboard. In addition to the regular typing keyboard, you'll notice eight function keys at the top labeled "f1," etc. On the right are arrow keys and a red "SEND" key. On the far left is the "TAB" key (by pressing "Shift" and "TAB" together, you can backtab). On the screen, the cursor is the flashing box that shows where you will begin typing on that screen. On computers, you must type a "1" for "one" (not a small "l") and a "0" for "zero" (not a big "O"). In Geac, whenever you see an <ACK?> (for acknowledge) with cursor beside it in the

bottom of the right side of the screen, you must press "SEND." Log on to the system by following these steps:

A. (Geac System Menu) <Selection> "mrm" "SEND"

B. (Giant MRMS screen) <Enter ID (or 'tcp'):> "your ID number" "SEND" (Note: Occasionally, at this screen or the one described in A. above, the cursor will be "stuck" in the upper left-hand corner of the screen. Turn the terminal completely off [with brightness knob] and right back on again. Press "SEND" until you get to a usuable screen.)

C. (SELECT screen) <SELECT:> "f3." This is the screen you will return to to begin searching every book.

9. Take a book from your truck and quickly look inside for a barcode already in book (near pocket)--if barcode present, return to your LC truck and go on to the next book. Now compare the call number on the spine (or cover) with the call number on the pocket of the book (usually near the front; if not, at back). If they are different, take a "MARK" (red) flag and put it in book. It is important that you also include a slip of paper telling what the correct call number should be (you will find this out after you search the book.) You will go ahead and barcode and link the book (as outlined below), but you will put it on the Problem Truck rather than returning it to your LC truck.

10. Open the book to the pocket and search the call number by following these steps:

A. <SEARCH TYPE: c> "TAB" "call number" "SEND." Some hints about call numbers: Do not type the word "Quarto" if found above your call number. Key in (type) your call number using small letters with NO spaces except before the final date (if present). There must be a "." immediately before the first letter after the first set of numbers in a call number--even if it is not typed on the book. For example: "LB1132.2.C45D27 1978". If you have a copy number ("c." and a number) added to the bottom of the call number, search without the copy and number. If you have a volume number ("v." or "vol." and a number) added to the bottom of the call number, search without the volume and number. Likewise, if you have a "number," "part," "supplement," etc. added to the bottom of the call number, search without this information. If you do not find a record, check your typing; it's very easy to incorrectly key in a call number. If you still do not find a record, try searching by title, and lastly author by following these steps:

B. To search by title: Press "f3" to get back to the search screen. <SEARCH TYPE: c> "t" "title" (just like it is on the cover--you can use "the," "a," and "an;" for example, "a christmas carol") "SEND". It is vital, however, that you check the <CALL:> (above the <CMD:> line) after you have called up a record for your title; if the call number on the screen does not exactly match the one on your book (except for "v.," "no.," etc.), do not "SEND" to see the record. Instead, Go on to 10.C. below.

C. To search by author: Press "f3" to get back to the search screen. <SEARCH TYPE: c> "a" "author" (in inverted form, for example, "dickens, charles"); "SEND." It is vital, however, that you check the <CALL:> (above the <CMD:> line) after you have called up a record for your title; if the call number on the screen does not exactly match the one on your book (except for "v.", "no.", etc.), do not "SEND" to see the record. Instead, put a "NO RECORD" (blue) flag in it and set it on the Problem Truck. If no record is found by call number, title, or author, look at the accession number (found on the same page [page after the title page] where the call number is handwritten). The accession number is written sideways and begins with a two-digit number. If this accession number begins with an "85," "86," or "87," put the book back on your booktruck without a flag or a barcode in it. If your accession number begins with anything OTHER than "85," "86," or "87," put a flag labeled "NO RECORD" (blue) in book and set on Problem Truck. Do not barcode or link book. (Remember all of our records are not yet in the full database, so there will be some call numbers not found.)

11. <Select Number:> "line number for your book" (even if you have only one choice you still must "select" it) "SEND." Did you get two choices for exactly the same call number (neither has a different date or anything else different)? If so, DO NOT go any further with that book. Do not search by title or author. DO NOT "select" either line number to look at. Rather, put a slip of paper saying "Duplicate" on it, date and initial it, insert into book, and put book on Problem Truck.

12. Now you are at a mostly blank screen. The three major Geac tasks you will be performing are display, change, and complete. To look at a screen showing the information for your book, follow these steps:

A. <CMD:> "SEND"

B. A "More" at the bottom right means you have more screens; press "SEND" to see them.

13. You are now ready to look at a Geac record. Some terms we'll be using are:

A. "record"--a complete showing of information pertaining to one book; will have one or more screens; has similar information to that on a card catalog card

B. "field"--a smaller unit of information (usually one line) such as author or title or paging information

C. "tag"--the three digits (on far left of screen) beginning every field

D. "delimeter"--(represented by a "$"); shows the beginning of a still smaller unit of information called a "subfield"

14. Look at the 300 field. It contains paging information.

A. Does last-numbered page match your book (don't worry about small Roman numeral pages or blank pages after the last-numbered page)? If not, put a "300" (purple) flag in book and put it on the Problem Truck. Do not barcode or link book.

Occasionally, you will find a 300 field that says "1 v. in various pagings," or "[number] p. in various pagings." This is fine, as long as your 966 field matches (see 15. below).

B. Is there a blank space and a "v." or "vols." (for open entry) after "$a," or a "v. 1-?" If so, see 16. below.

C. Is there a number before a "v." or "vols." (for multi-volume set) after "$a?" If so, see 16. below.

D. Is there a "no.," "part," "suppl.," or "issue" after the call number on your book (this will not show up in the 300 field)? If so, see 16. below.

15. Look at the 966 field. (There will often be more than one 966 field; you should look for the one described in 15.A.-15.D. below). It contains:

A. "$c and a number" to tell the copy number (will usually be "1;" on your book, you have a copy one if your call number does not have "c. 2," "c. 3," etc. below it)

B. "$1 MAIN" or "MAINQ" (Quarto [big] book)

C. "$m BOOK"

D. "$s and call number;" must match in the following manner: the "base" call number on the screen must match the one on your book. This means that the "$s" may or may not show any volume, number, part, supplement, etc. information found on the bottom of your call number (if this information IS already in the "$s," do NOT add a "$d," "$e," etc. before it; also do NOT change "vol." to "v.," etc. [see 16. below for further information]). If your call number has a date, it MUST be in "$s." If the base call number is not the same, put a "CALL #" (orange) flag in book and put on Problem Truck. Do not barcode or link book.

E. If 15.A., 15.B., or 15.C. above are not correct, you will change the information by copying ("cpy") and correcting a 966 field (see 17. below). If, however, this information matches exactly, you will change "cng" the 966 field by following these steps:

a. <ACK?> "SEND"

b. <CMD:> "cng" <TAG:> "966" "SEND"

c. "TAB" two times <CNG? n> "y" DO NOT "SEND"

d. Type over whatever is in "$c" to make it read your copy number. Do not press "SEND"

e. Move the cursor (by moving the arrow) to immediately after the "$s and call number." Type "$b"

f. Peel off one barcode at a time. Go down a whole column (numbers are in order) before beginning the next column. Place barcode in the center of the page with the book pocket on it, approximately 1/2 inch from the top, if enough room. If there is no room above pocket, try below. If still no room, try a page as close as possible to the pocket, placing it with numbers readable from left to right without having to turn book. In any event, do NOT place a barcode on a pocket. Press whole barcode down firmly. Go in sequential order and use one full page of barcodes before going to another. If you misplace, wrinkle, or otherwise damage a barcode, take a black marker and heavily mark

through both the barcode lines and the number below them. Place another barcode in book as close as possible to desired spot. (If any problems, put slip of paper with name, date, time, and type of problem in book and put on Problem Truck.) Do keep track of how many barcodes were "wasted" and add it to your statistics form.

g. Move cursor to directly after the "$b:" run magic wand across barcode bars from left to right until the number appears on the screen (it will disappear quickly and it will NOT beep like at the grocery store!).

h. <CMD:> "cmp" "SEND"

i. <CMP? y> "SEND"

j. "f3"

You have now displayed, changed, and completed your record.

16. For an open entry, multi-volume set, or "no.," "part," etc., (described in 14.B., 14.C., and 14.D. above), follow these steps:

A. First check the 966 field (described in 15.A.-15.D. above)

B. Change the 966 field (barcode and link your book):

a. <ACK?> "SEND"

b. <CMD:> "cng" <TAG:> "966" "SEND"

c. "TAB" two times <CNG? n> "y" DO NOT "SEND"

d. Move the cursor (by moving the arrow) to immediately after the "$s and call number"

e. Add these "$" and subfields before you add "$b barcode number" and wand book. Use only these delimeters ("$") and abbreviations. Geac will not recognize them in any other form. Use only those that apply and follow the order as it appears on your call number. Do not, however, change values for subfields. This means that you may have "$e no. 1$d v. 2," etc., if that's how it appears on your call number. The subfields go after "$s and call number." Leave one space after the abbreviation and period (if present) before you type your number. You will find all needed information right below your call number. The examples below all use the number "1;" you should use whatever number is on your book.

1. $d v. 1 (for volume)
2. $e no. 1 (for number)
3. $f pt. 1 (for part)
4. $g suppl. 1 (for supplement)
5. $h issue 1 (for issue)

f. Type "$b"

g. Wand barcode

h. <CMD:> "cmp" "SEND"

i. <CMP? y> "SEND"

j. "f3"

Mr. Geac insists that you change "n" to "y" on "cng" "966," that you put "$b" before you wand your barcode, and that you "cmp" after you wand your barcode. There is no built-in way for you to know if you forgot any of these, and we may not know until on down

the line when books are checked out with the Geac system. But the ghost of Geac Past will come back to haunt you, so please be extra careful!!

17. There is only one more command we'll learn--to be used when you can't use any 966 field present and need to make a new one. This would happen if all 966 fields already had a "$b barcode" in them, or there were none that said "$1MAIN $mBOOK." If you are linking more than one copy or more than one volume (number, part, etc.) at the same time, you can add all 966 fields before you complete record (15.E.h. through 15.E.j. above). If you need to add a 966 field, you must "cpy" (copy) it and correct it. Follow these steps:

A. <CMD:> "cpy" <TAG:> "966" "SEND"
B. "TAB" two times
C. <TO:> "966" DO NOT "SEND" "TAB" once
D. Move cursor (by moving arrow) to type over or add any corrections needed; for example: "$c" to another copy number; "$1" to "MAIN," "$m" to "BOOK," "$d," "$e," etc. to other numbers
E. Move cursor (by moving arrow) to immediately after "$s and call number" (or immediately after "$d v. 1," etc.). If there is not yet "$b" and a barcode number, type "$b." If there IS "$b" and a barcode number, move cursor to the "3" immediately following the "$b"
F. Wand barcode
G. <CMD:> "cmp" "SEND"
H. <CMP? y> "SEND"
I. "f3"

18. Are there problems with the book not outlined above? (Surely not!) If yes, put a slip of paper with your name, date, time, and problem in book and set on the Problem Truck. It is important that we have all of this information in case we need further explanation on the type of problem.

19. Return book to left side of the block and proceed with the next book. Remember to hang a "THIS SIDE DONE" sign where appropriate.

20. Call x3768 or x3712 when you near the end of a truck. You MUST call us; students will not magically appear. You also should call when the Problem Truck needs to be unloaded. A student will be sent to unload and reload your truck. There should be a fourth unlinked truck ready to go at all times. Use it after you complete yours. So you will not be working on the same letter all the time. You will often find a partially-linked truck under the telephone. Go ahead and finish it before calling for a brand new one. Please be sure to hang a "THIS SIDE DONE" sign on EACH side of a completed truck. And please do not call for a student and then leave before he/she arrives, unless someone else still linking can relay the necessary message. It is very important that ALL linkers (including those not linking in Room 209) NOT bring booktrucks to "somewhere outside of Room 209." Others do not know why they're there, if they've been linked or not, if they need to be unloaded, etc. CALL Cataloging for a student. If it

becomes necessary (due to student shortages) for remote sites to unload/load their own trucks, please discuss the process with Lyn first. Remember to get a "ZOHUGO Error Report Form" (on supply table) if this shows up on your terminal. Use only the special cloths (and instructions) to clean terminals. Do NOT use kleenex. If you need to leave Room 209, log off, turn off lights, and close the door. The room often appears locked when it really isn't. Turn knob to the left; it's very hard to turn.

21. When your scheduled time is finished, LOG OFF by following these steps:

    A. <SEARCH TYPE: c> "x" "SEND"
    B. <SELECT:> "log" "SEND"

22. Turn brightness off of terminal screen, fill out your statistics form and return it to "Statistics Box" on supply table. Remember to fill in all information on your form. To get total books barcoded, subtract the smaller (first) barcode number from the larger (last) one and add one.

OUTLINE OF GEAC COMMANDS

LOG ON

1. (Geac System Menu) <Selection> "mrm" "SEND"
2. (Giant MRMS screen) <Enter ID (or 'tcp'):> "your ID number" "SEND"
3. (SELECT screen) <SELECT:> "f3" DO NOT "SEND"

SEARCH

1. <SEARCH TYPE: c> "TAB" "call number" "SEND"
2. <Select Number:> "line number for your book"

DISPLAY

1. <CMD:> "SEND"

CHANGE

1. <ACK?> "SEND"
2. <CMD:> "cng" <TAG:> "966" "SEND"
3. "TAB" two times <CNG? n> "y" DO NOT "SEND"
4. Move the cursor (by moving the arrow) to immediately after the "$s and call number." Type "$b"
5. Wand barcode

COMPLETE

1. <CMD:> "cmp" "SEND"
2. <CMP? y> "SEND"
3. "f3"

COPY

1. <CMD:> "cpy" <TAG:> "966" "SEND"
2. "TAB" two times <TO:> "966" DO NOT "SEND" "TAB" once
3. Move cursor to type over or add any corrections needed
4. Move cursor to immediately after "$s and call number" (or immediately after "$d v. 1," etc.).
5. If there is not yet "$b" and a barcode number, type "$b". If there IS "$b" and a barcode number, move cursor to the "3" immediately following "$b"
6. Wand barcode

LOG OFF

1. <SEARCH TYPE: c> "x" "SEND"
2. <SELECT:> "log" "SEND"

NAME_____

DATE_____

BARCODING TIME IN_____

BARCODING TIME OUT_____

TOTAL BOOKS BARCODED_____

TOTAL BARCODES WASTED_____

FIRST BARCODE NUMBER USED

_____

LAST BARCODE NUMBER USED

_____

ANY BARCODE NUMBERS MISSING
OR OUT OF ORDER

_____

_____

FIRST CALL NUMBER BARCODED

_____

LAST CALL NUMBER BARCODED

_____

Name _____ Page _____

Date	Time In	Time Out	Total Hours	Total Bks. Bar.	Total Bar. Wast.	First Barcode # Used	Last Barcode # Used	Bar. #'s miss.	First call number Barcoded	Last call number Barcoded	Quality Check

Master Log

Page _____

Date	Total Hours	Total Books Barcoded	Comments
	18		

Barcode Log _____ Page _____

Date	Beginning Barcode	Ending Barcode	No. of Sheets	Total Barcodes Left	Need to order?	Comment